

# **SiteManager** **Training Manual**



Module A  
Chapter 2

**Contract Administration (+)**  
**Contract Records (+)**  
**Contract Funding**

## **Section A-2-5-2** **Viewing Contract Funding**

<b>Student's Version</b>
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Indiana Department of Transportation  
August, 2007 Version 3.7b

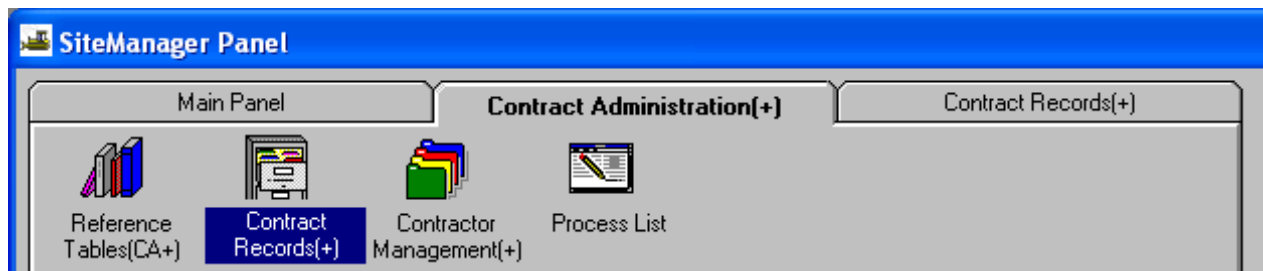
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## Viewing Contract Funding Information

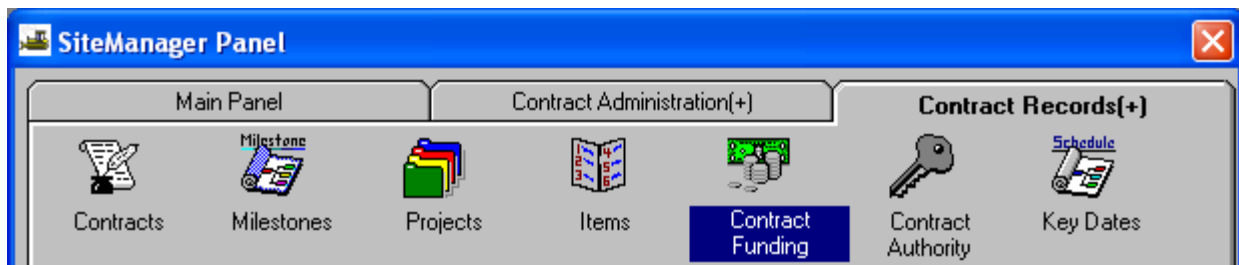
The funding for a contract is set up in the Contract Funding window.



“Double-click” on **Contract Administration (+)** located on the Main Panel.



“Double-click” on **Contract Records (+)**



“Double-click” on **Contract Funding**.

**Contract List**

**Selection**

Contract ID


Find :

**Contract ID**

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Loca
R-90002	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90005	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT OA
R-90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90007	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT OA

OK Cancel

The **Contract List** panel will open:

If the **Contract List** panel does not open then “click” on the **Open**  button on the toolbar.

The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract  
“Double click” on the appropriate **Contract ID**.

**AASHTO SiteManager**

File Edit Services Window Help

**Contract Funding**

Contract ID: R-90006

Contract ID	Project Number	Category Number	Line Item Number	Funding Source Code	Funding Source Description	Priority Order	Source Participation Percent
R-90006	9620710	0001		H24	STP-FLEX-STE	1	80
R-90006	9620710	0001		01	STATE FUNDS	1	20
R-90006	9620710	0001		ZZZ	DUMMY SOURCE FUND	2	100
R-90006	982071A	0001		H24	STP-FLEX-STE	1	100
R-90006	982071A	0001		ZZZ	DUMMY SOURCE FUND	2	100

Project Number: 9620710

Funding Source Code: H24

Category Number: 0001

Line Item Number:

Local Agreement Nbr: 0

Fed/State Project Nbr: 3387005

Purchase Order Number: 05022669

State Funding Code: 405

Original Cap Amt: 464074.94

Current Cap Amt: 464074.94

Funding Source Description: STP-FLEX-STE

Source Participation Percent: 80

Priority Order: 1

Combine: ☐ Like Item Code ☐ Proposal Num ☒ None

Related Item:

Proposal Line Nbr:

Prev Estimates Amt Used: 85102.84

Current Estimate Amt Used: 36093.97

The Contract Funding panel lists the current funding specifications in the top panel. Data for the selected funding record is displayed in the bottom panel.

**Project Number:** the **Project Number** is a unique number assigned to the project.

**Funding Source Code:** **Funding Source Code** is coding assigned by Procurement.

**Funding Source Description:** **Funding Source Description** is a description of the funding source assigned by Procurement.

**Category Number:** **Category Number** is a grouping of Items assigned during the design phase. Items can be grouped within Categories for various funding reasons.

**Source Participation Percent:** **Source Participation Percent** is the percentage of the total amount in the Project/Category provided by the Funding Source. (For example, many federal aid Funding Sources provide 80% of the funding for the Project/Category.).

**Priority Order:** **Priority Order** indicates the order in which funds are appropriated to the Contract.

**AASHTO SiteManager**

File Edit Services Window Help

**Contract Funding**

Contract ID: R-90006

Contract ID	Project Number	Category Number	Line Item Number	Funding Source Code	Funding Source Description	Priority Order	Source Participation Percent
R-90006	9620710	0001		H24	STP-FLEX-STE	1	80
R-90006	9620710	0001		01	STATE FUNDS	1	20
R-90006	9620710	0001		ZZZ	DUMMY SOURCE FUND	2	100
R-90006	982071A	0001		H24	STP-FLEX-STE	1	100
R-90006	982071A	0001		ZZZ	DUMMY SOURCE FUND	2	100

Project Number: 9620710

Funding Source Code: H24

Category Number: 0001

Line Item Number:

Local Agreement Nbr: 0

Fed/State Project Nbr: 3387005

Purchase Order Number: 05022669

State Funding Code: 405

Original Cap Amt: 464074.94

Current Cap Amt: 464074.94

Funding Source Description: STP-FLEX-STE

Source Participation Percent: 80

Priority Order: 1

Combine: ☐ Like Item Code ☐ Proposal Num ☒ None

Related Item:

Proposal Line Nbr:

Prev Estimates Amt Used: 85102.84

Current Estimate Amt Used: 36093.97

**Line Item Number:** Line Item Number is the Project Line Item Number of a Non-Participating item on the project. The Non-Participating Items have their own Funds and set of priorities within the project.

**Local Agreement Nbr:** Local Agreement Nbr are numbers used to identify an agreement between a local authority and the INDOT. The agreement defines the funding provided by the local authority with regard to a particular Contract.

**Federal/State Project Nbr:** Federal/State Project Nbr is the number assigned for the Federal/State Project Number.

**Purchase Order Nbr:** Purchase Order Nbr is the number of the Purchase Order.

**Original Cap Amt:** Original Cap Amt is the original amount of funding for the selected fund.

**Current Cap Amount:** is the funding amount from the purchase order for the selected fund. Additional funds from Advice of Change form associated to the selected funding source will modify the Current Cap Amount.

**Previous Estimate Amt Used:** Previous Estimate Amt Used is the amount used from the selected fund on approved estimates.

**Contract Funding** Generic Fields

Contract ID: R -90006

Contract ID	Project Number	Category Number	Line Item Number	Funding Source Code	Funding Source Description	Priority Order	Source Participation Percent
R -90006	9620710	0001		H24	STP-FLEX-STE	1	80
R -90006	9620710	0001		01	STATE FUNDS	1	20
R -90006	9620710	0001		ZZZ	DUMMY SOURCE FUND	2	100
R -90006	982071A	0001		H24	STP-FLEX-STE	1	100
R -90006	982071A	0001		ZZZ	DUMMY SOURCE FUND	2	100

Project Number: 9620710  
 Funding Source Code: H24  
 Category Number: 0001  
 Line Item Number:  
 Local Agreement Nbr: 0  
 Fed/State Project Nbr: 3387005  
 Purchase Order Number: 05022669  
 State Funding Code: 405  
 Original Cap Amt: 464074.94  
 Current Cap Amt: 464074.94

Funding Source Description: STP-FLEX-STE  
 Source Participation Percent: 80  
 Priority Order: 1  
 Combine: ☐ Like Item Code  
☐ Proposal Num  
☒ None  
 Related Item:  
 Proposal Line Nbr:  
 Prev Estimates Amt Used: 85102.84  
 Current Estimate Amt Used: 36093.97

**Current Estimate Amt Used: Current Estimate Amt Used** shows the current generated estimate amount for selected funding source.

**Contract Funding** Generic Fields

Contract ID: R -90006

Contract ID	Federal Priority	Generic Code 52	Generic Code 53	Generic Code 54	Generic Code 55
R -90006	01				
R -90006					
R -90006					
R -90006					
R -90006					

“Click” on the **Generic Fields** button located on the toolbar.

**Federal Priority:** The Federal Priority is the priority listed on the purchase order.

“Click” the **Generic Fields** button located on the toolbar to close the Generic Fields panel.

**Contract Funding** Close

Contract ID: R -90006

Contract ID	Project Number	Category Number	Line Item Number	Funding Source Code	Funding Source Description	Priority Order	Source Participation Percent
R -90006	9620710	0001		H24	STP-FLEX-STE	1	80

“Click” the **Close** button located on the toolbar.

### A-1-2-5-2 Group Exercise

What's the total funds spent on previous and current estimates on project 9620710 of Contract R -90007?

Login	<u>inquire</u>
Password	<u>pass</u>

Double-click on **Contract Administration (+)**.

Double-click on **Contract Records (+)**.

## Double-click on **Contract Funding**

Click the Open button

Select Contract ID R -90007

Top Panel: Select the entry for

Project 9620710Funding Source Code H24

Bottom Panel:

Previous Estimate Amount Used: \_\_\_\_\_

Current Estimate Amount Used: \_\_\_\_\_.

Top Panel: Select the entry for

Project 9620710Funding Source Code 01

Bottom Panel:

Previous Estimate Amount Used: \_\_\_\_\_.

Current Estimate Amount Used: \_\_\_\_\_.

Total Funds Used: \_\_\_\_\_.

## “Click” Close.

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